

FIG. 1

Client Module
122

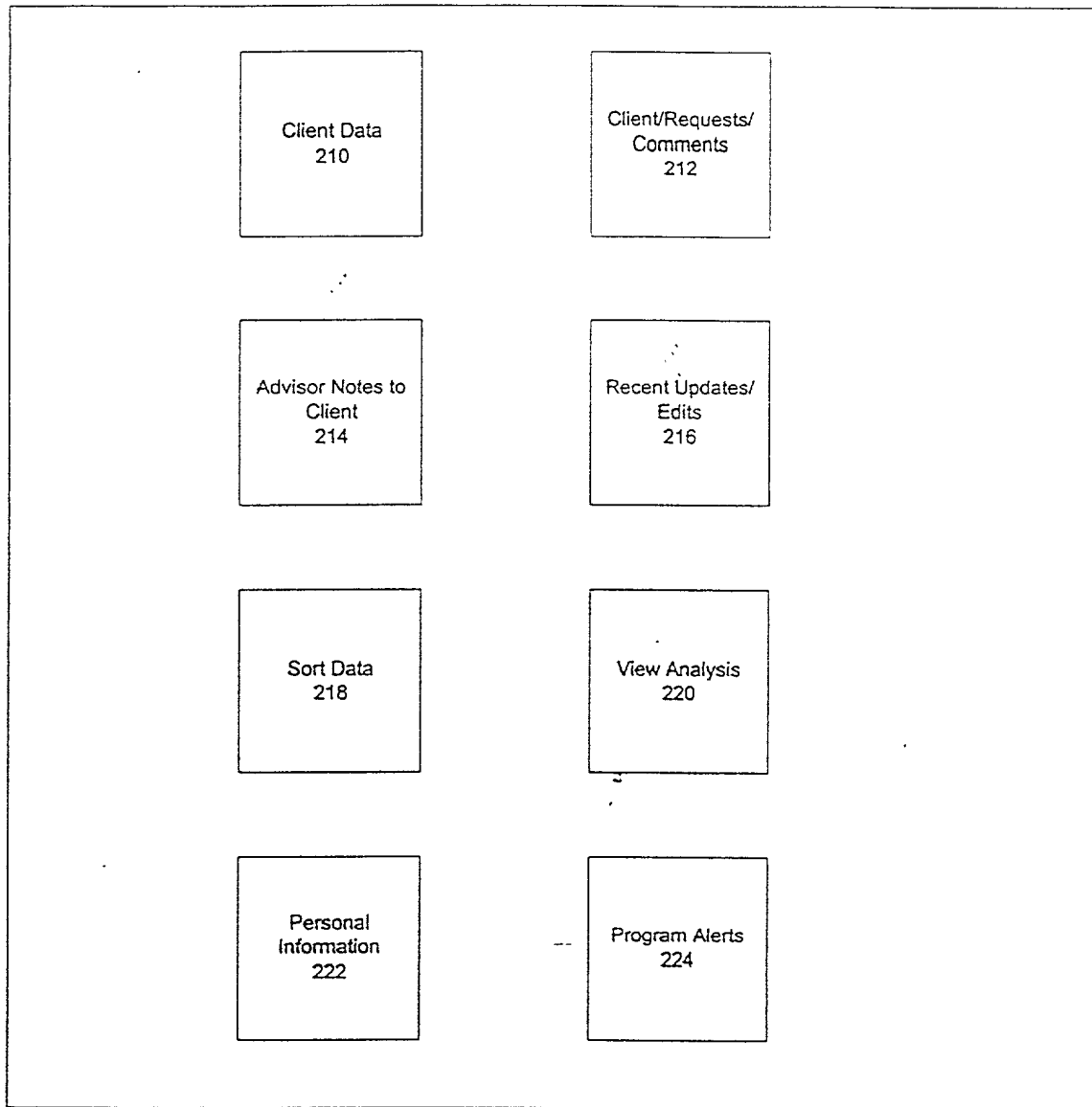


FIG. 2

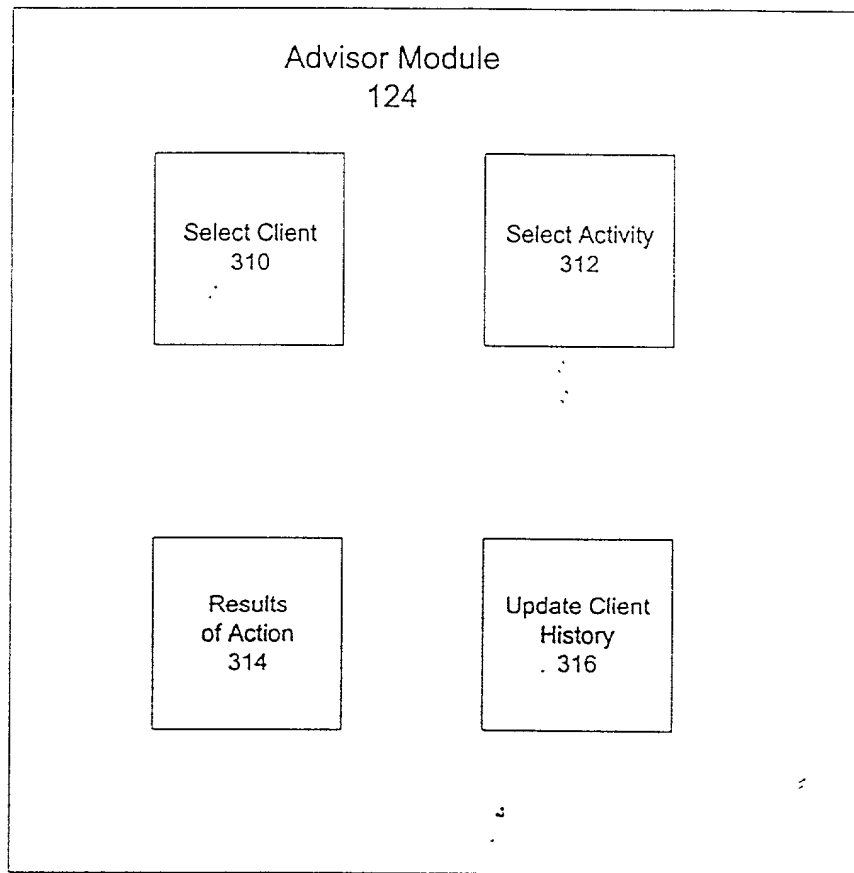


FIG. 3

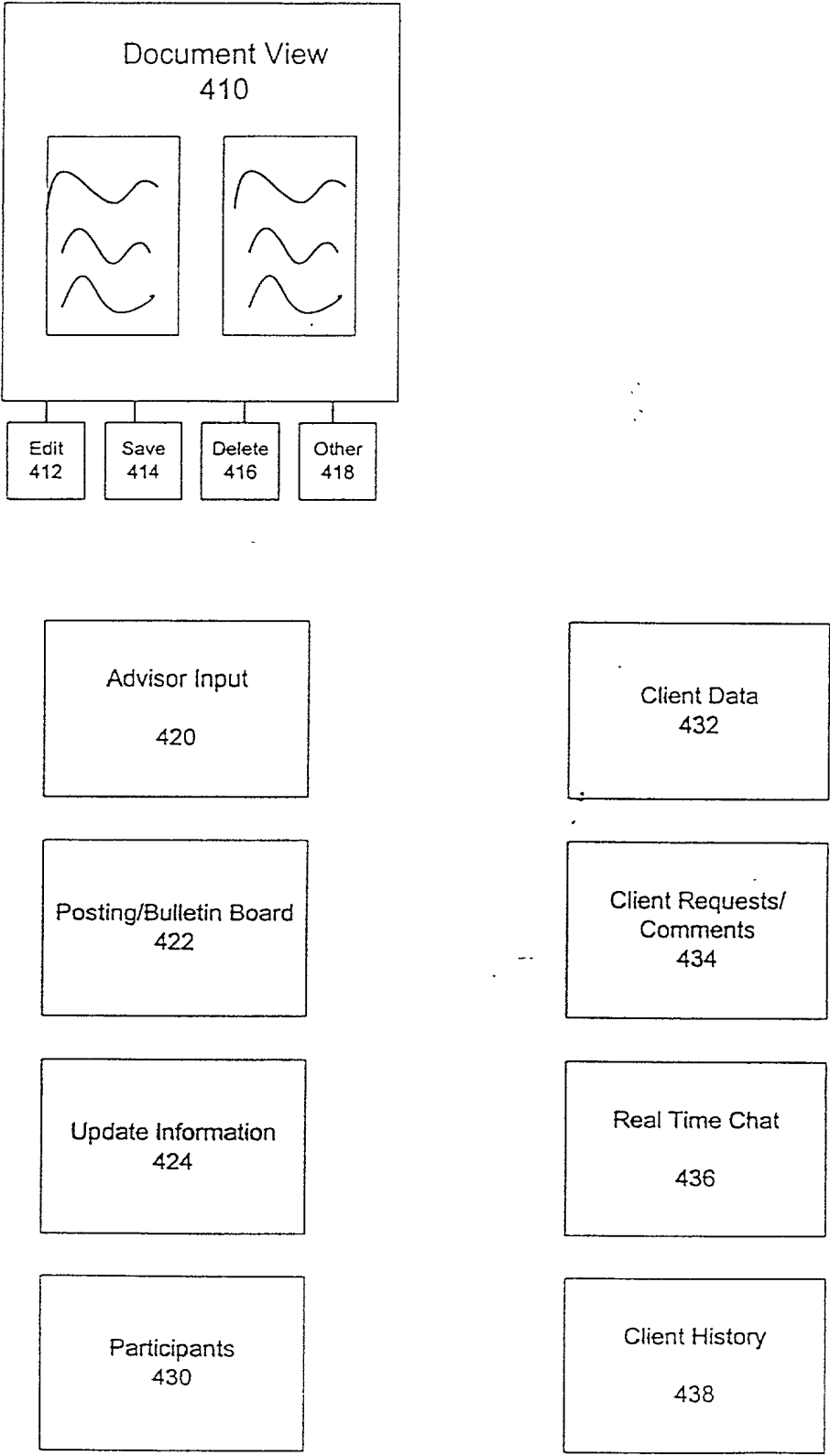


FIG. 4

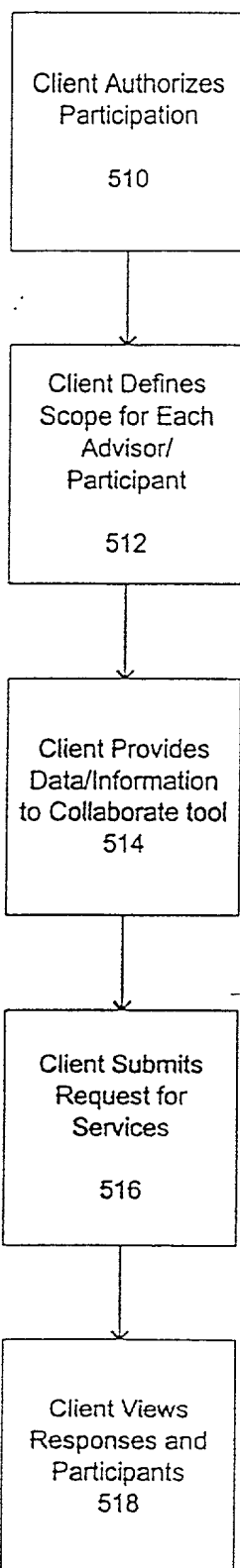


FIG. 5

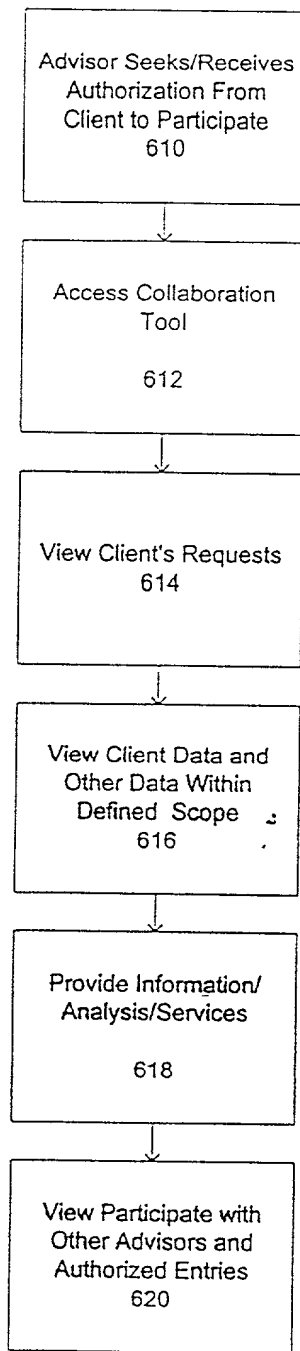


FIG. 6

FIG. 7

Sign Up Request

Please Fill in the following (all are required). When you are done, press "Next" to continue.

☒ I am an **advisor** and would like to join the next generation of financial advisors
☐ I am a **client** and would like to build my own powerful financial advisory team

Personal Information about yourself:

	First Name
	Last Name
	Address
	City
	State
	Zip
	Phone Number
	Email Id

~ 704

Done

Internet

FIG. 7

Adviser Module 122

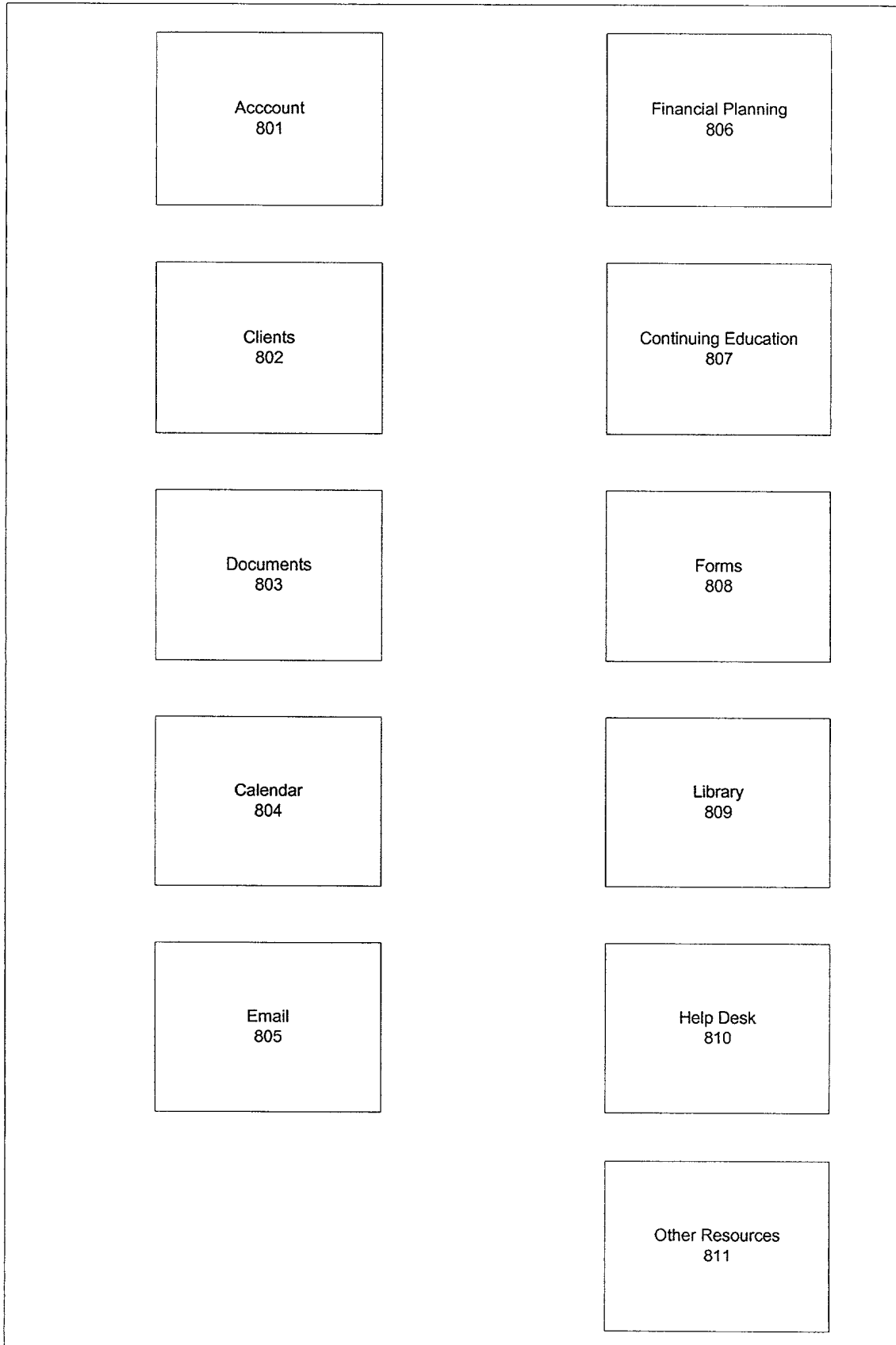


FIG. 8

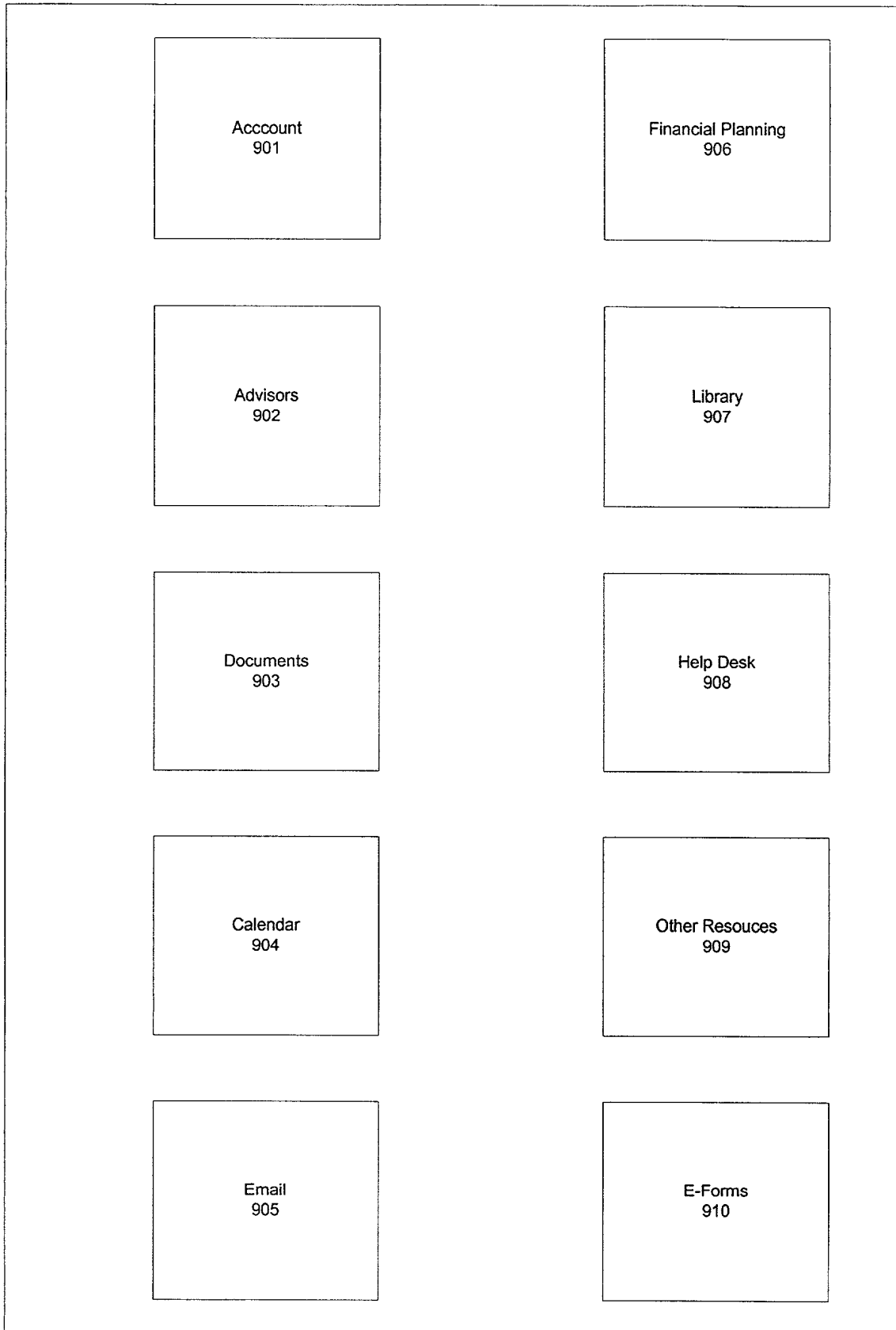


FIG. 9

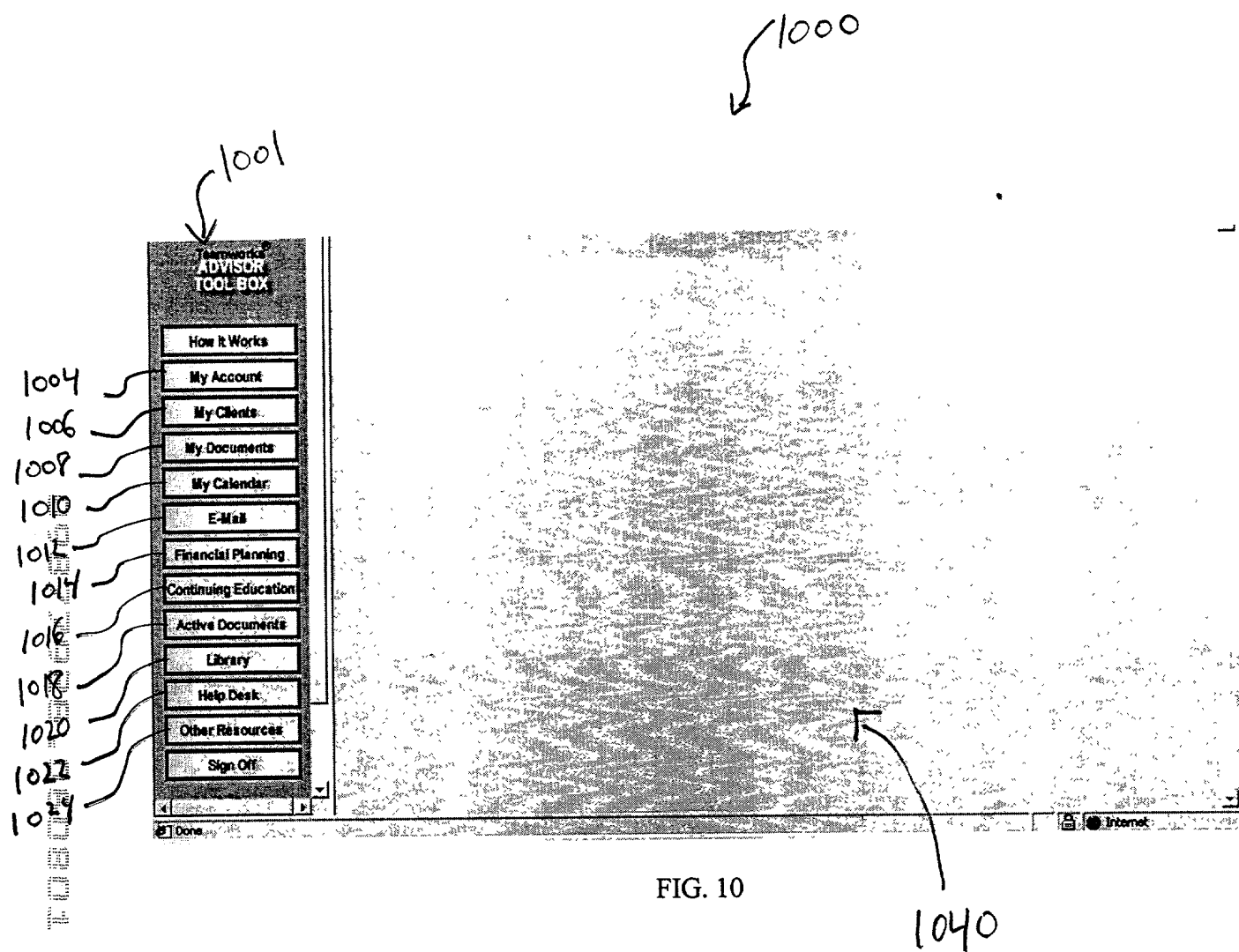


FIG. 10

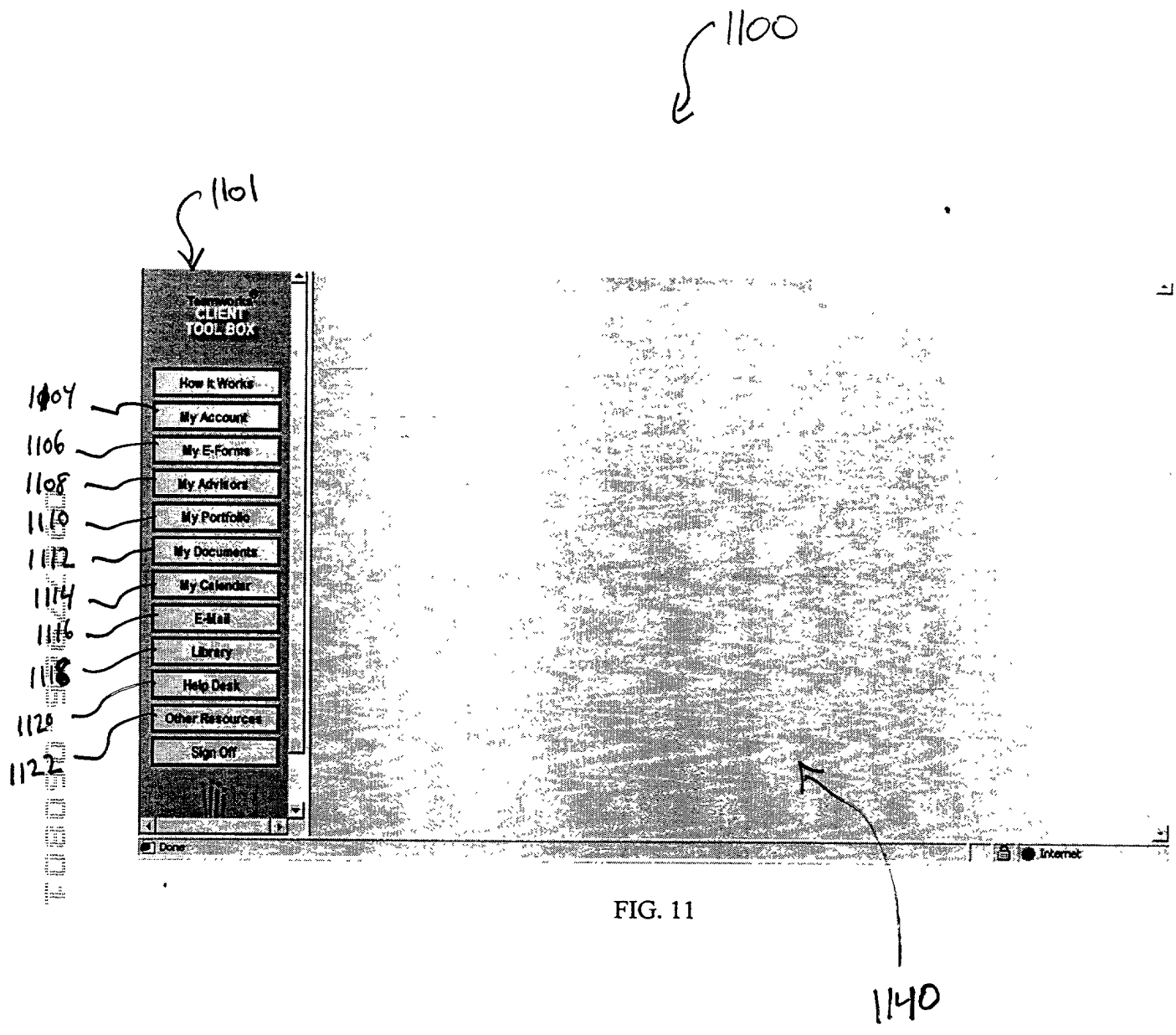


FIG. 11

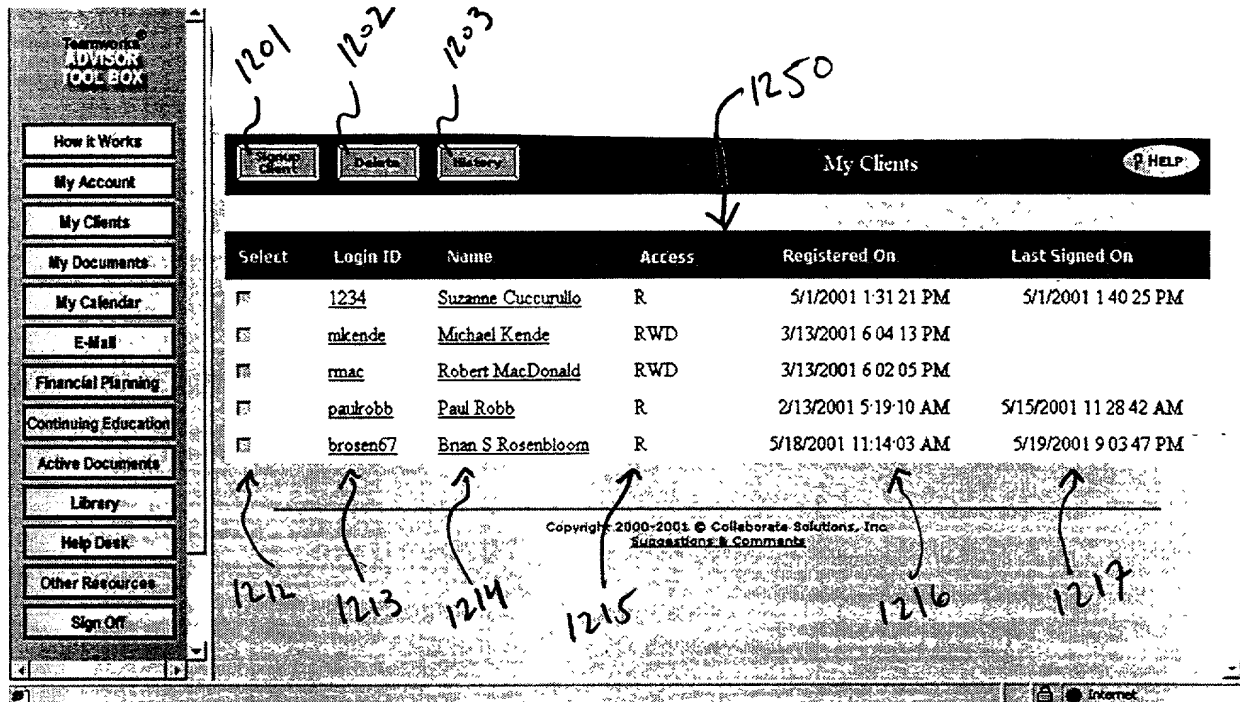


FIG. 12

1300

09877926 060904

Registration Information (Fields marked with * are required)

* Name (First, Middle, Last)

* Email Address

Login Information

Logon ID

Password

* Re-enter Password

Billing Information

The charges for this client (\$/mo.) will be added to your bill

Discount ☒ I would like to pay by the month (at the price shown above)
☐ I would like to receive a 20% discount by paying for a full year

1304

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Done Internet

FIG. 13

1400

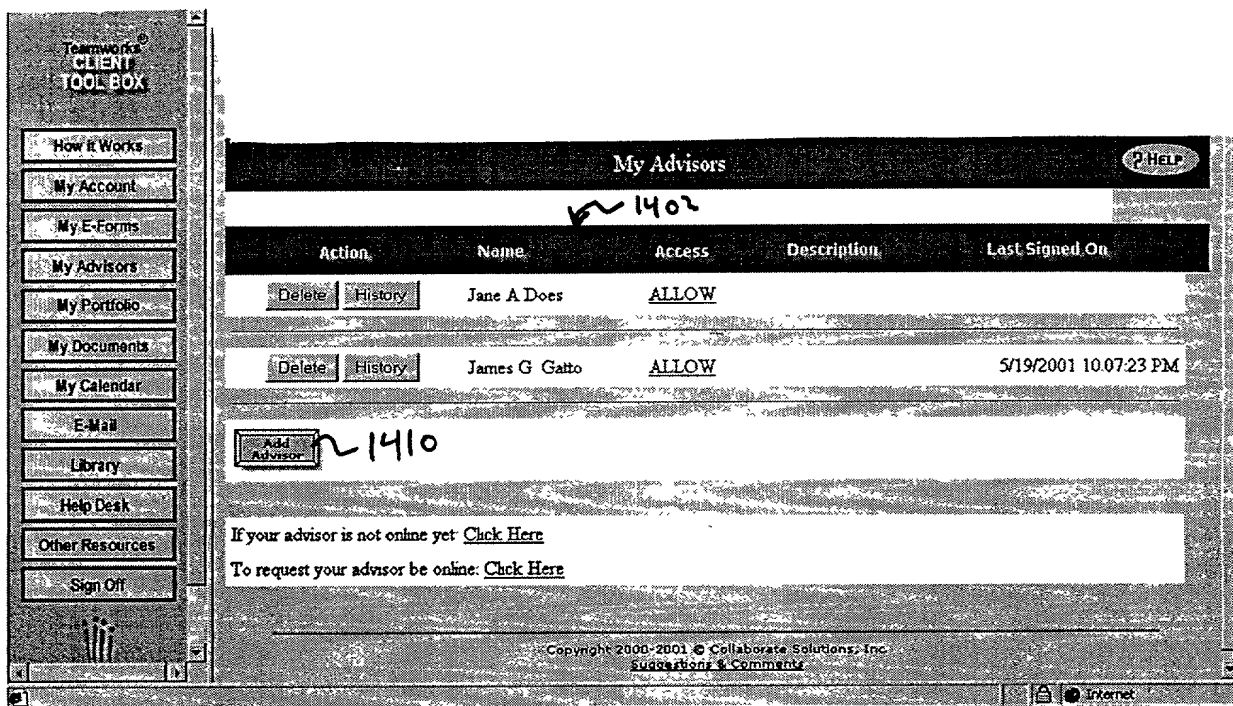


FIG. 14

Name Search:

Adviser's Name

~1502

Specialty (select one or more optional)

☐

Attorney

☐

Accountant

.

.

☐

Financial Planner

State (optional)

City (optional)

1503
~
1504

1505

Search

~1506

Specialty Search

Specialty (select one or more)

☐

Attorney

☐

Accountant

.

.

☐

Financial Planner

State (optional)

City (optional)

1507
~
1508

1509

Search

1511

FIG. 15

1600 1600 1600 1600 1600

1600
↙

Name	Specialty	State	City	Description	Action
John Doe	Attorney	DC	Washington	AV Rated	ADD <div>1602</div>
Jane Does	Accountant	DC	Washington	CPA	ADD <div>1602</div>
John Doe	Financial Planner	DC	Washington		ADD <div>1602</div>

Done

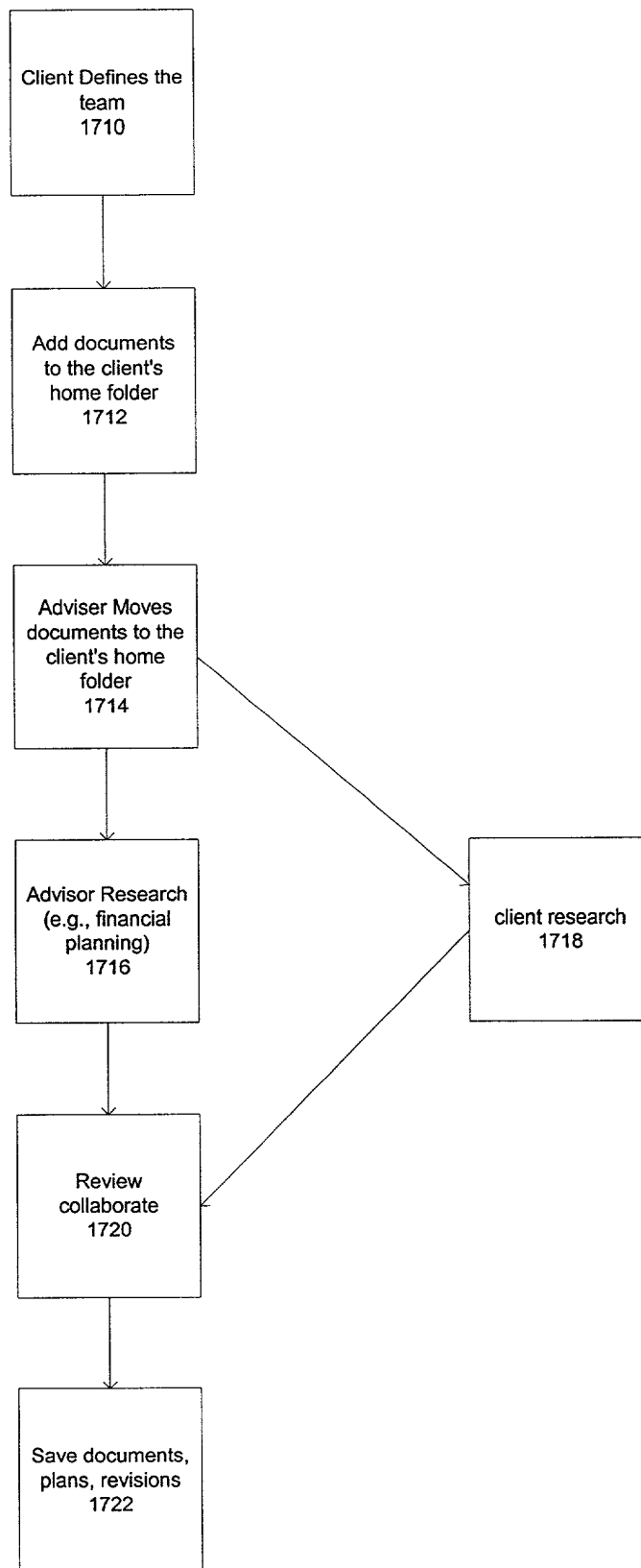


FIG. 17

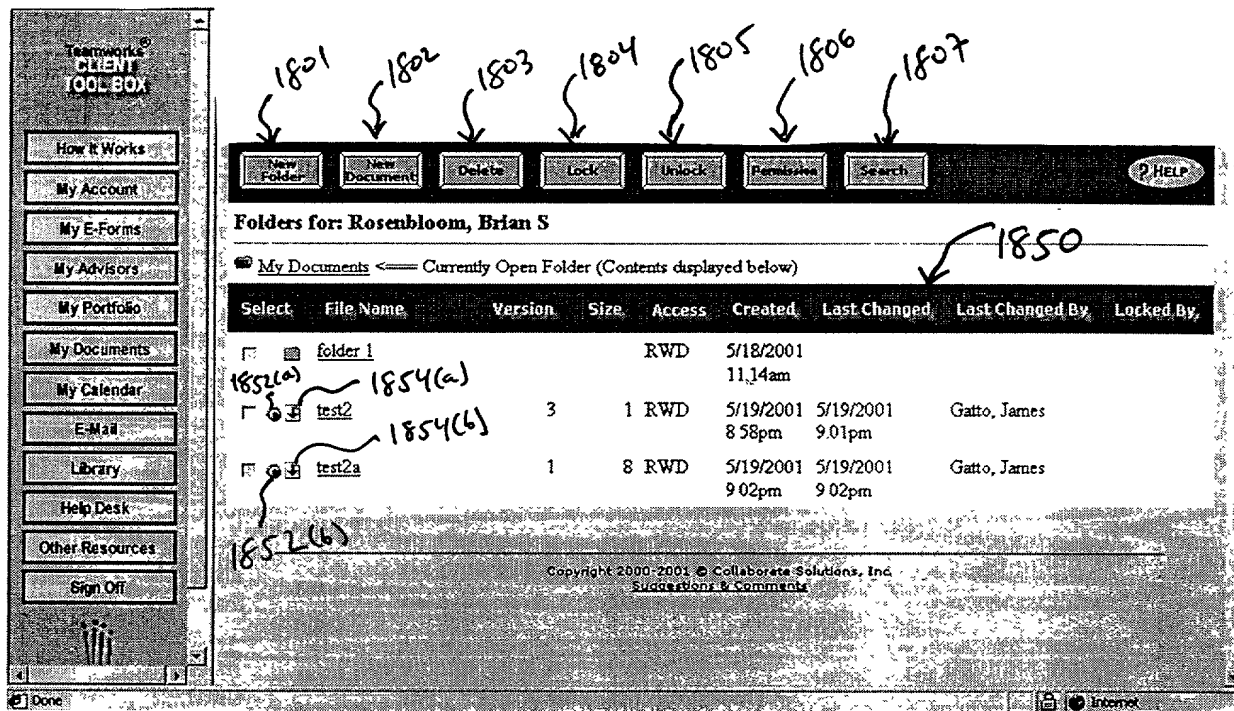


FIG. 18

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 3. **Methodology**
 4. **Results**
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 246. **Author Contributions**

FIG. 19

FIG. 19

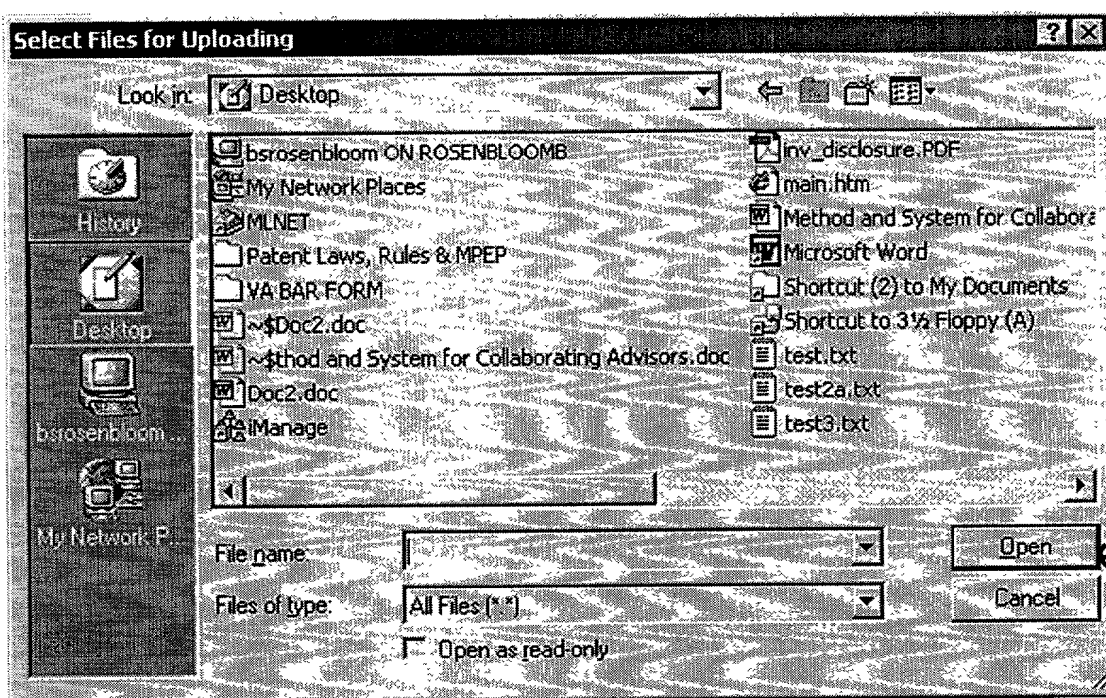


FIG. 20

2100

Create Folder

HELP

Create Folder In My Documents

Folder Name

Comments

2102

OK

Cancel

FIG. 21

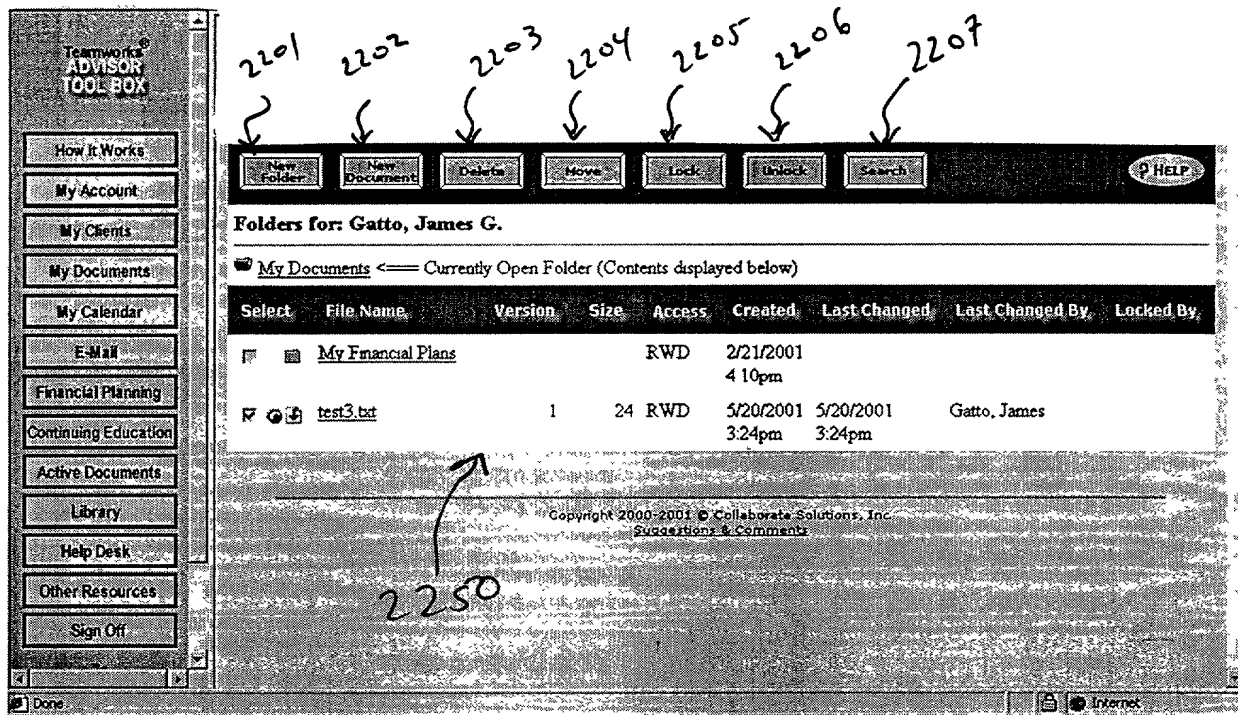
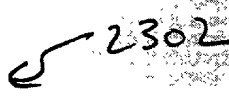


FIG. 22

Figure 1 consists of 12 histograms arranged vertically, each representing a different value of n (10, 20, 30, 40, 50, 60, 70, 80, 90, 100, 110, 120). The x-axis for all histograms is labeled 'x' and ranges from 0 to 120. The y-axis is labeled 'count' and ranges from 0 to 100. The histograms show that as n increases, the distribution of x becomes more concentrated around n , with the peak count increasing from approximately 10 for $n=10$ to approximately 100 for $n=120$.



2304

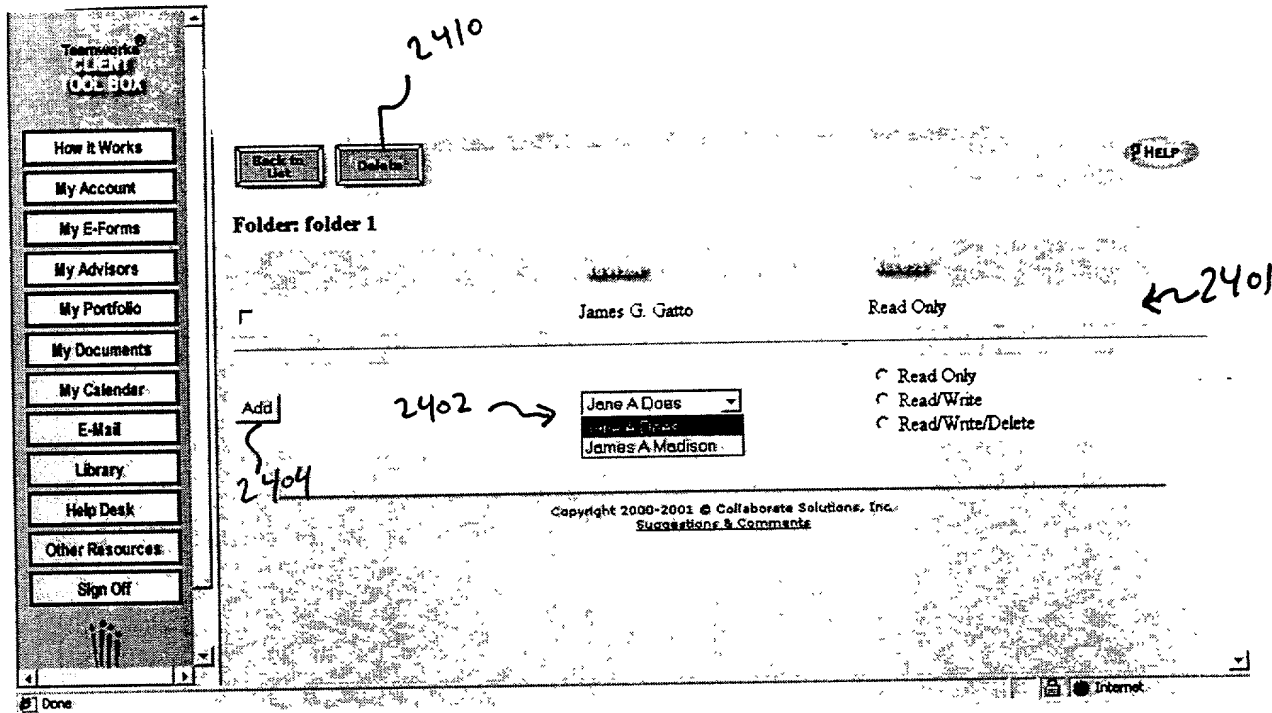


FIG. 24

093799:0004
T03090:960280

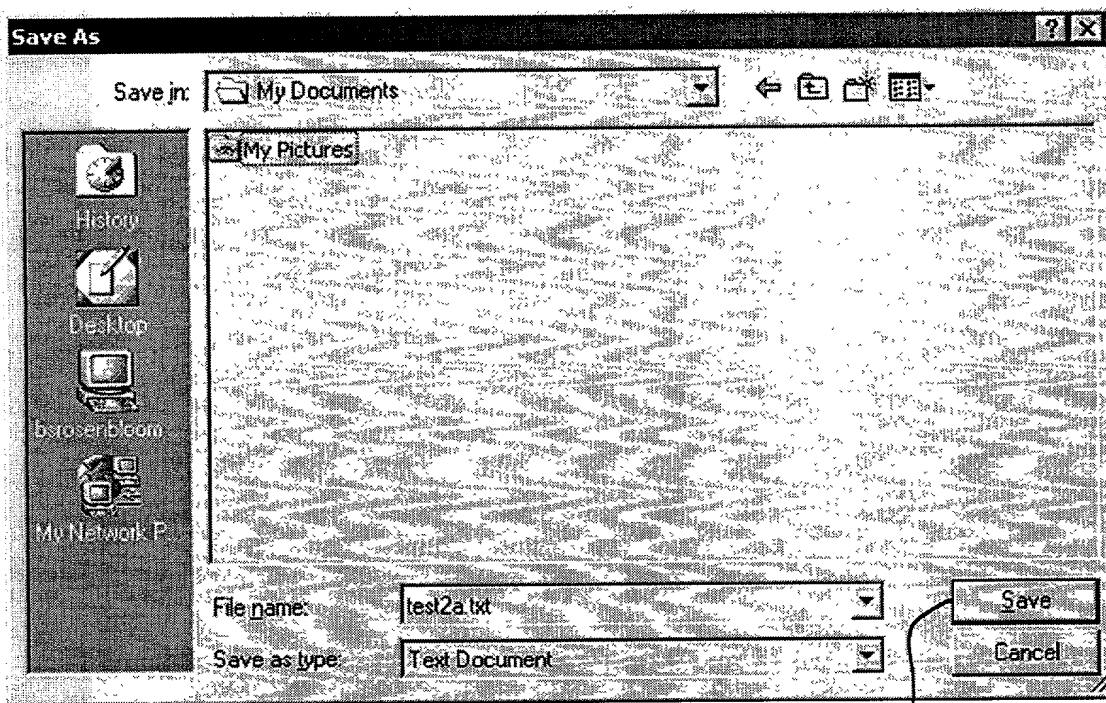


FIG. 25

2700

Add Document Version HELP

Document Name: test3

2710

Files	Size
Select document to upload:	
Select File	Remove File

2702

Email notification? ☐ 2715

Comments

2790

OK Cancel

2714

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Suggestions & Comments

Done Internet

FIG. 27

2800

Document Comments

HELP

Document Name test3

Comments

2802

Save

Back

5/21/2001
10:59:04 AM

Brian S.
Rosenbloom

Document new version created

2810

5/20/2001
6:40:08 PM

Brian S.
Rosenbloom

Document initially created

Done

Internet

FIG. 28

2900

2901 2902 2903 2904 2905 2906

2951 2952

2950

How It Works
My Account
My Clients
My Documents
My Calendar
E-Mail
Financial Planning
Continuing Education
Active Documents
Library
Help Desk
Other Resources
Sign Off

New Folder New Document Delete Move Lock Unlock Search HELP

Folders for: Rosenbloom, Brian S Note: You are now viewing a Client area

My Documents <== Currently Open Folder (Contents displayed below)

Select	File Name	Version	Size	Access	Created	Last Changed	Last Changed By	Locked By
<input type="checkbox"/>	Folder 1			R	5/18/2001 11:14am			
<input type="checkbox"/>	test2	3	1 RWD	5/19/2001 8:58pm	5/19/2001 9:01pm	Gatto, James	Rosenbloom, Brian	
<input type="checkbox"/>	test2a	1	8 RWD	5/19/2001 9:02pm	5/19/2001 9:02pm	Gatto, James	Rosenbloom, Brian	
<input type="checkbox"/>	test3	4	367 RWD	5/20/2001 6:40pm	5/21/2001 3:16pm	Gatto, James		

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Done Internet

FIG. 29

2600 2601 2602 2603 2604

3000

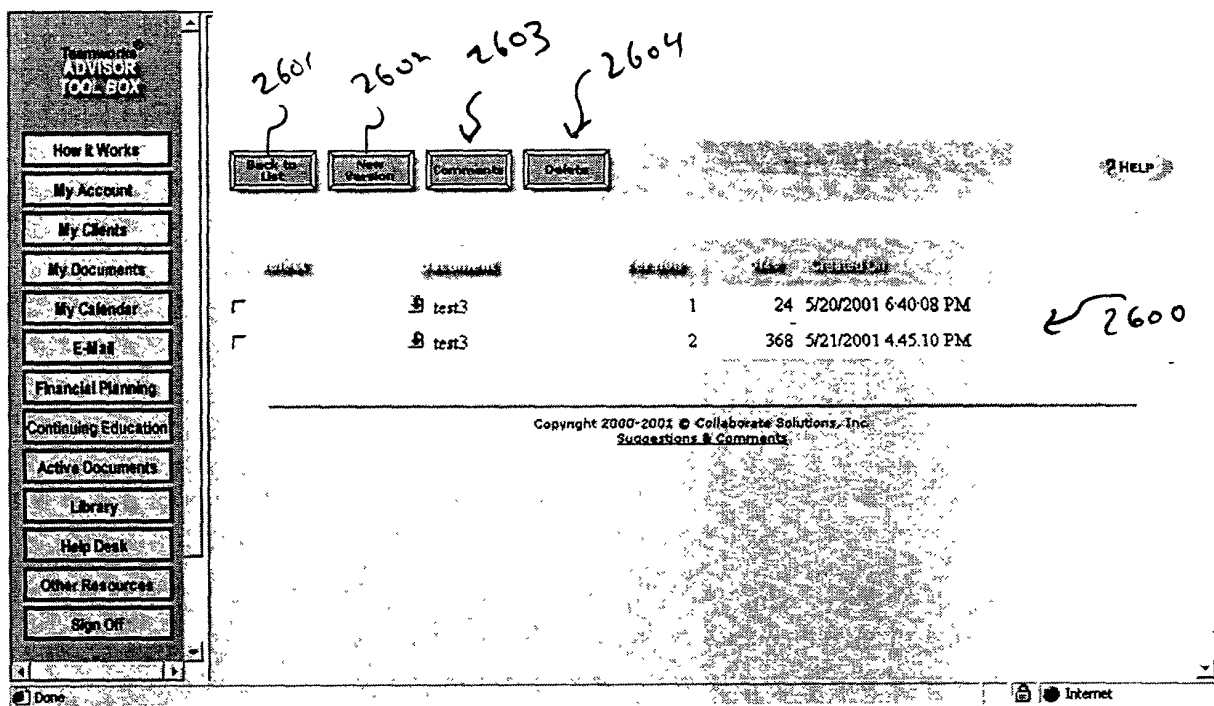


FIG. 30

103050" 9207'860

Teamworks
CLIENT
TOOL BOX

How It Works
My Account
My E-Forms
My Advisors
My Portfolio
My Documents
My Calendar
E-Mail
Library
Help Desk
Other Resources
Sign Off

3102
3104
3106

Update History Delete this Login ID

HELP

My Account Information

Name	Brian	S	Rosenbloom
Email	brian@mail.com		
Password			
Confirm Password			
Address			
City			
State			
Postal Code			

Done Internet

FIG. 31

3200

Teamworks®
CLIENT
TOOL BOX

How It Works

My Account

My E-Forms

My Advisors

My Portfolio

My Documents

My Calendar

E-Mail

Library

Help Desk

Other Resources

Sign Off

Back

Help

Document	Count	Date	Action	Document Name	Document Folder	Document Subfolder
test doc	1	5/19/2001 2:58:25 PM	add	James G. Gatto	folder 1	
test doc	1	5/19/2001 2:58:34 PM	read	James G. Gatto	folder 1	
test doc	1	5/19/2001 2:59:12 PM	move	James G. Gatto	folder 1	folder 1
test doc	1	5/19/2001 5:15:57 PM	read	Brian S. Rosenbloom	folder 1	
test doc	2	5/19/2001 5:18:36 PM	add	Brian S. Rosenbloom	folder 1	
test doc	1	5/19/2001 5:22:33 PM	read	Brian S. Rosenbloom	folder 1	
test doc	2	5/19/2001 5:23:01 PM	delete	Brian S. Rosenbloom	folder 1	
test2	1	5/19/2001 8:58:24 PM	add	James G. Gatto	My Documents	
test2	1	5/19/2001 8:58:38 PM	read	James G. Gatto	My Documents	

Done Internet

FIG. 32

3300 3302 3300

3300

3302

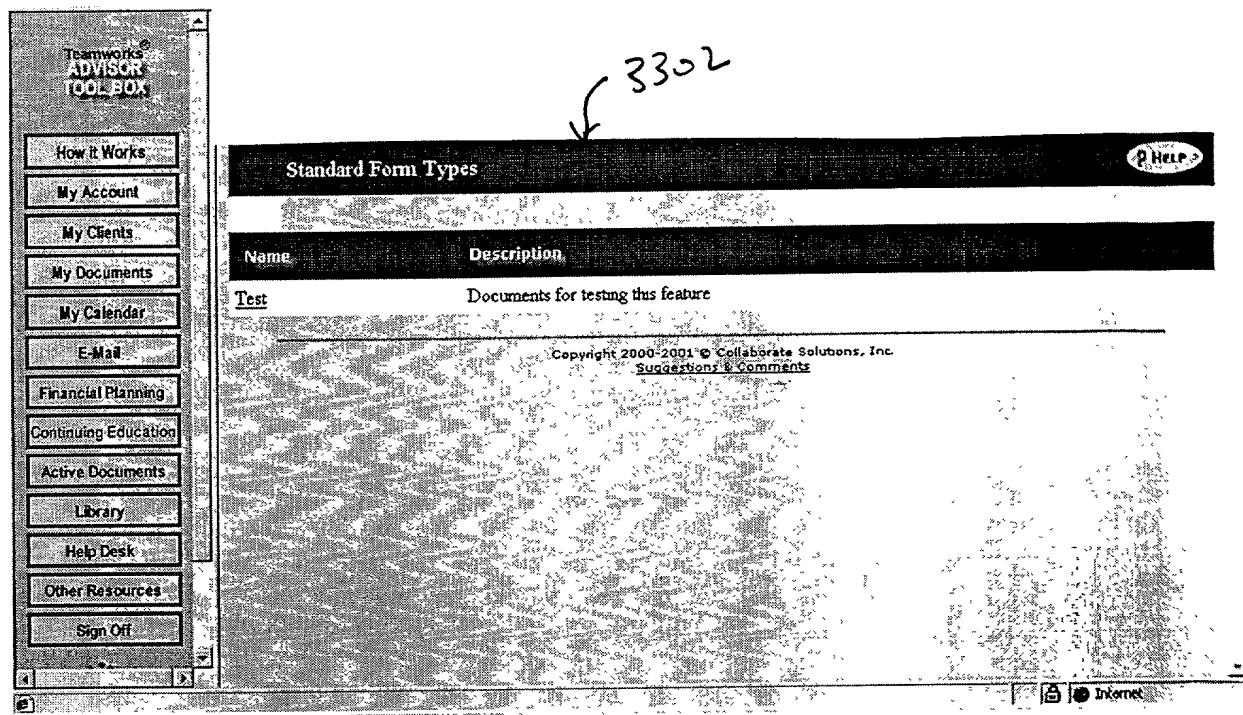


FIG. 33

3400

Network
ADVISOR
TOOL BOX

How It Works
My Account
My Clients
My Documents
My Calendar
E-Mail
Financial Planning
Continuing Education
Active Documents
Library
Help Desk
Other Resources
Sign Off

Standard Form Types

PHelp

Action	Name	Description	Client	Create Date	Last Modified
Add	Notice of Withdrawal Rights		Suzanne Cucurullo		

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Suggestions & Comments

3406 3402 3404

Unknown Zone (Mixed)

FIG. 34

3500

Framework
CLIENT
TOOL BOX

How It Works

My Account

My E-Forms

My Advisors

My Portfolio

My Documents

My Calendar

E-Mail

Library

Help Desk

Other Resources

Sign Off

My Forms

HELP

Action	Name	Description	Advisor	Create Date	Last Modified
<div>Edit</div> <div>Delete</div>	Notice of Withdrawal Rights	Notice of Withdrawal Rights	James G. Gatto	5/22/2001 12:52:36 PM	5/22/2001 12:52:36 PM

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Suggestions & Comments

3503

3501

3504

3505

3506

3507

Done

Unknown Zone (Mixed)

FIG. 35

3600

Teamworks CLIENT TOOL BOX

How It Works
My Account
My E-Forms
My Advisors
My Portfolio
My Documents
My Calendar
E-Mail
Library
Help Desk
Other Resources
Sign Off

My Forms HELP

Form Name	Notice of Withdrawal Rights
Form Description	Notice of Withdrawal Rights
<u>Name of trust</u>	
Beneficiary Name	
<u>Husband First Name</u>	
<u>Husband's Last Name</u>	
<u>Wife First Name</u>	
<u>Wife Last Name</u>	
Gender of Insured/Grantor	<input type="radio"/> male <input type="radio"/> female <input checked="" type="radio"/> entity
<u>Trustee name</u>	
Number of trustees	<input type="radio"/> one <input checked="" type="radio"/> multiple
Co-Trustee name	
<input type="button" value="Save"/> <input type="button" value="Back"/>	

Done Unknown Zone (Mixed)

3602

FIG. 36

3500

Teemworks
CLIENT
TOOL BOX

How It Works
My Account
My E-Forms
My Advisors
My Portfolio
My Documents
My Calendar
E-Mail
Library
Help Desk
Other Resources
Sign Off

My Forms Help

Action	Name	Description	Author	Create Date	Last Modified
Delete Done	Notice of Withdrawal Rights	Notice of Withdrawal Rights	James G Gatto	5/22/2001 12:52:36 PM	5/22/2001 11:20 PM

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[Suggestions & Comments](#)

3702
3503

Done Unknown Zone (Mixed)

FIG. 37

3400

ADVISOR TOOL BOX

How It Works
My Account
My Clients
My Documents
My Calendar
E-Mail
Financial Planning
Continuing Education
Active Documents
Library
Help Desk
Other Resources
Sign Off

Standard Form Types

HELP

Action	Name	Description	Client	Create Date	Last Modified
Delete:					
Edit	Notice of Withdrawal Rights	Notice of Withdrawal Rights	Brian S Rosenbloom	5/22/2001 12:52:36 PM	5/22/2001 1:15:20 PM
File					
Add	Notice of Withdrawal Rights		Suzanne Outcortulla		

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Suggestions & Comments

3801 3802

Done Internet

FIG. 38

Additional Modules 3901

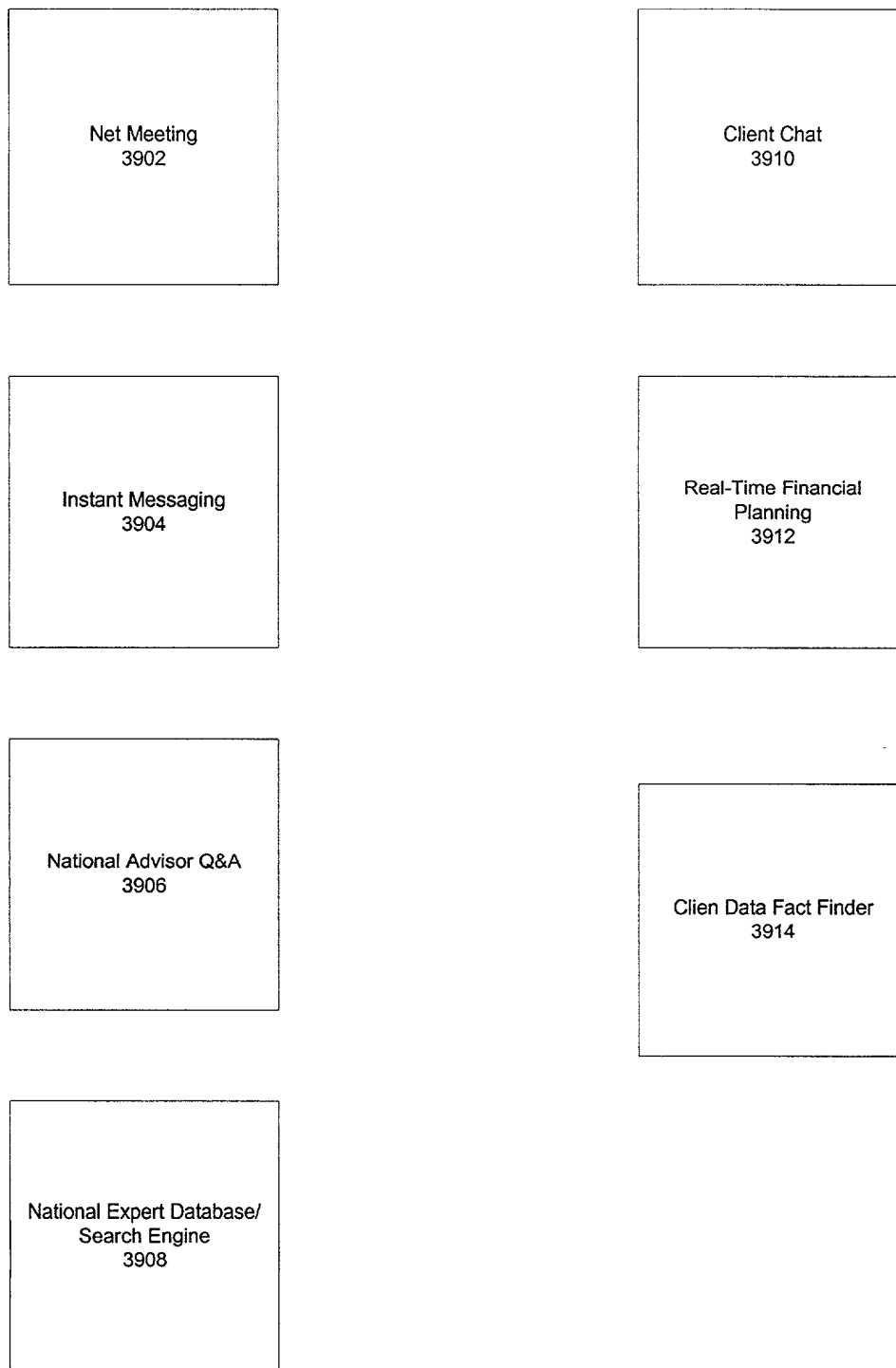


FIG. 39

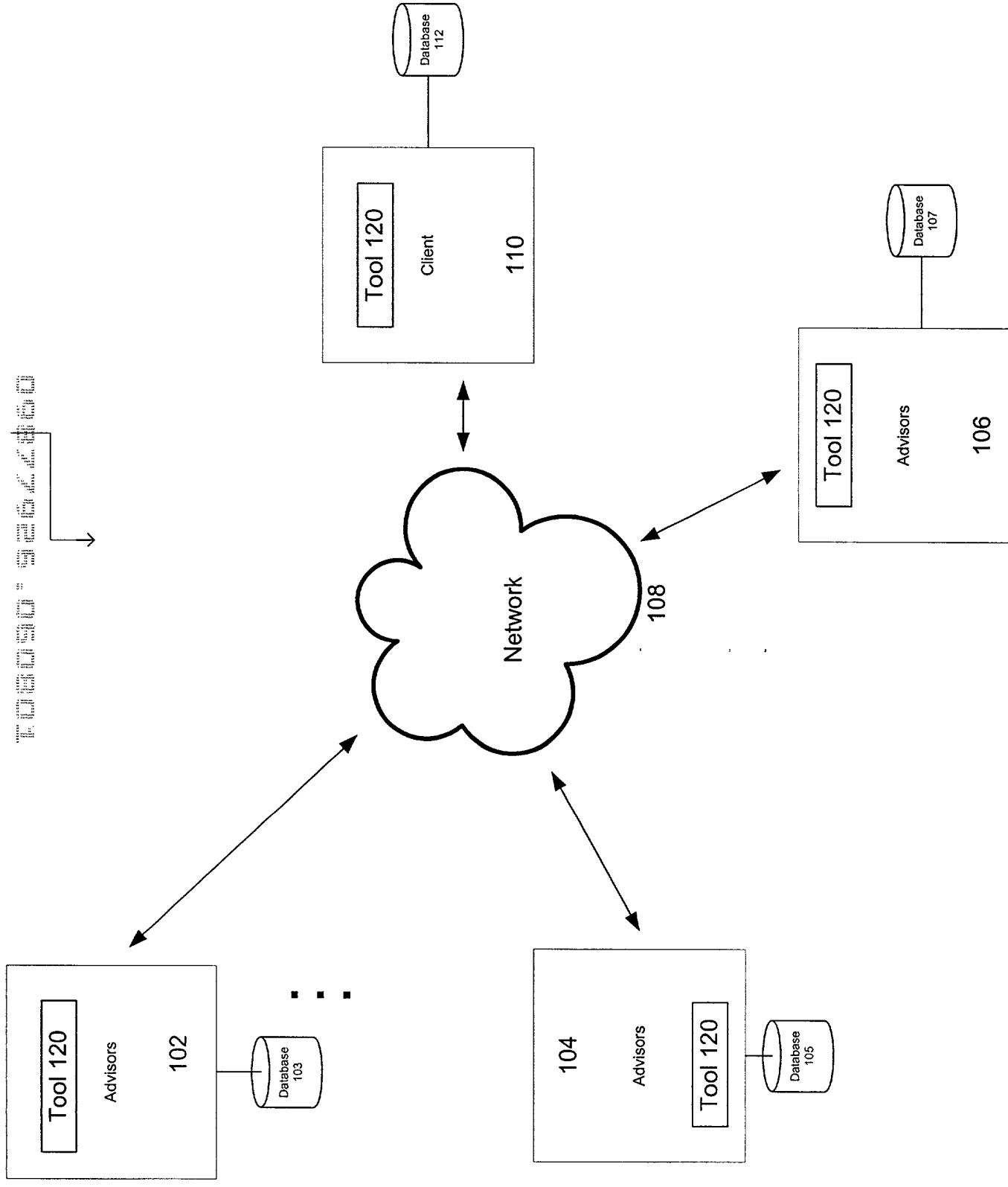


FIG. 40

FIG. 41

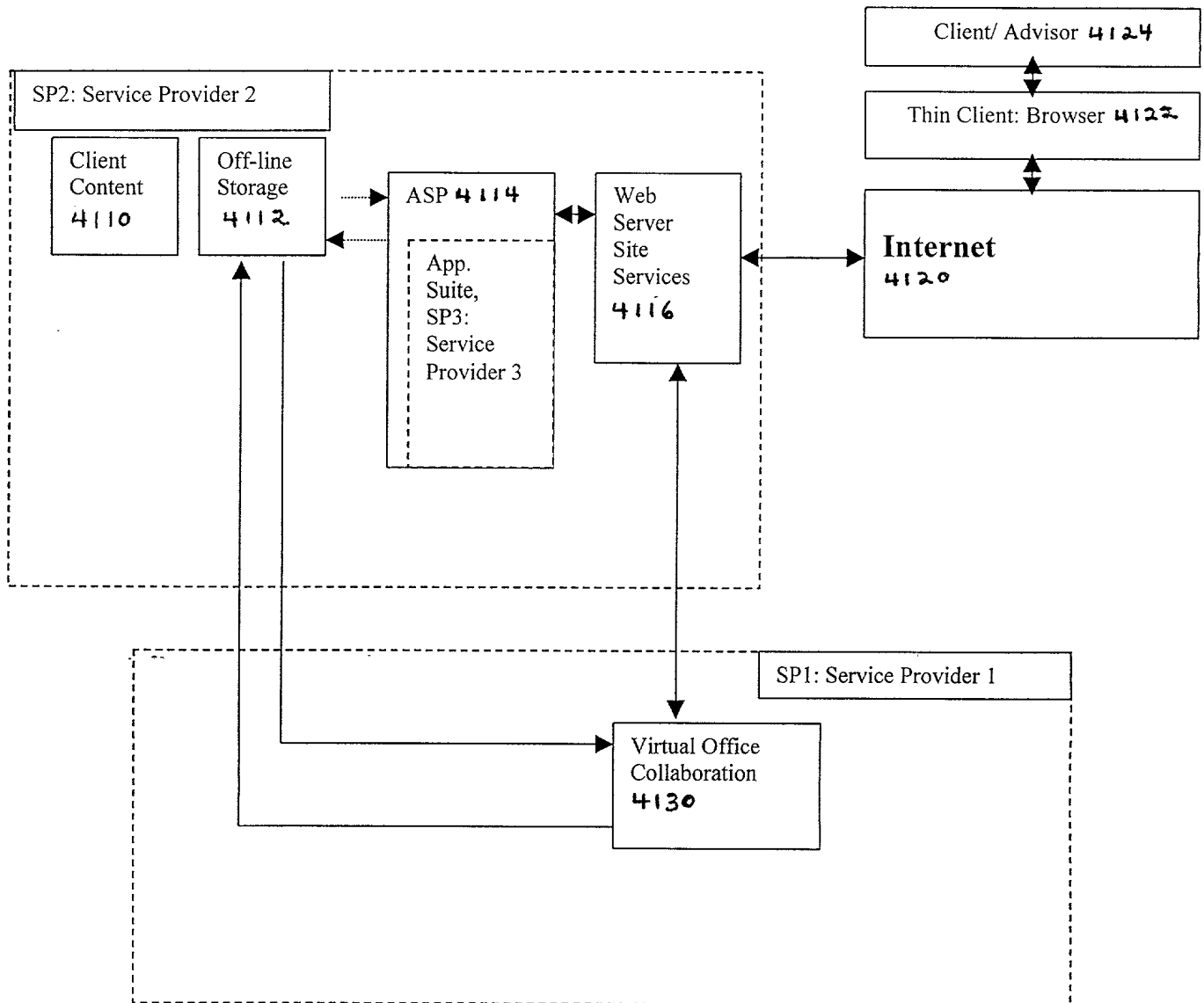


FIG. 41

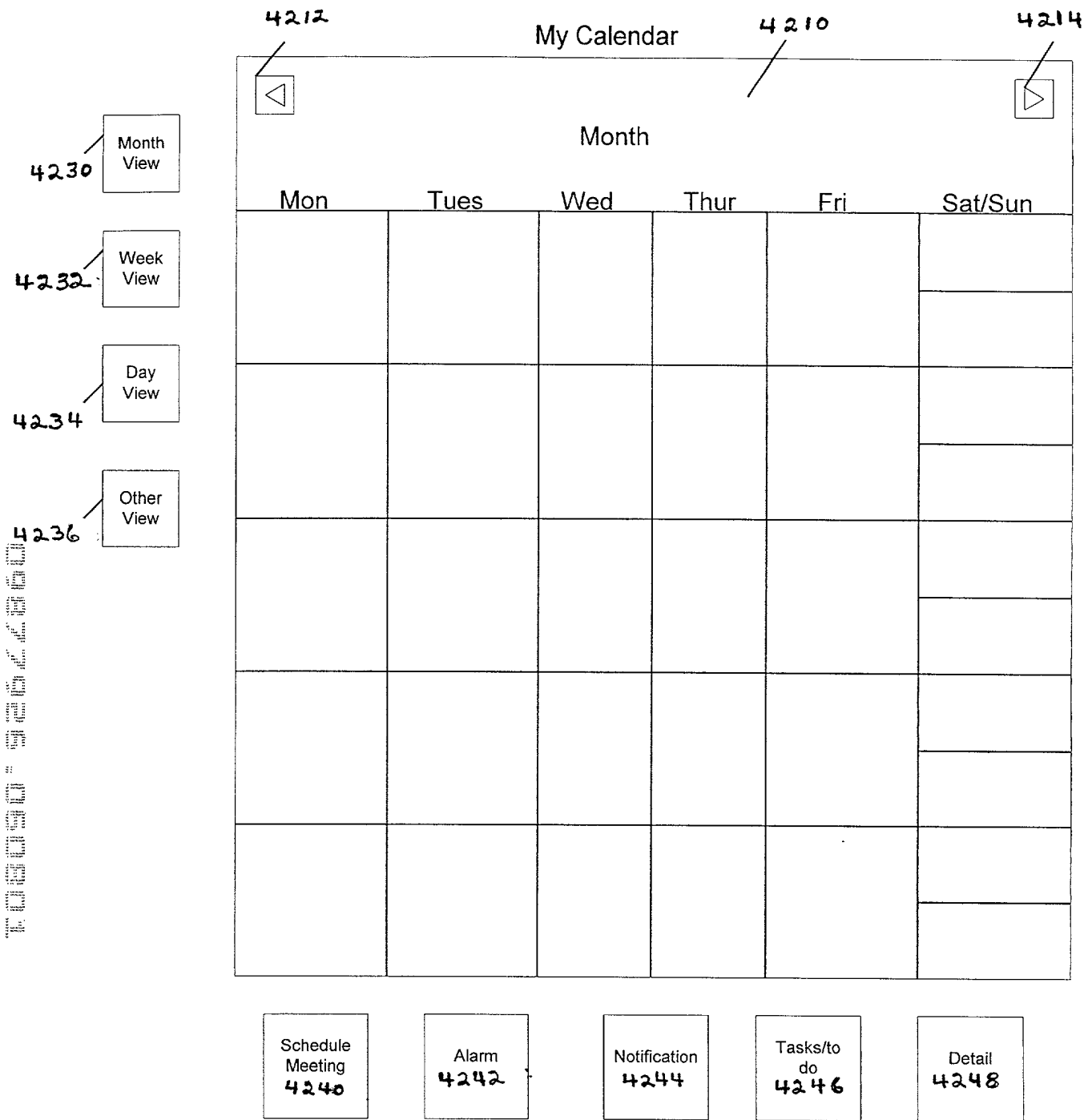


FIG. 42

FIG. 43

4300

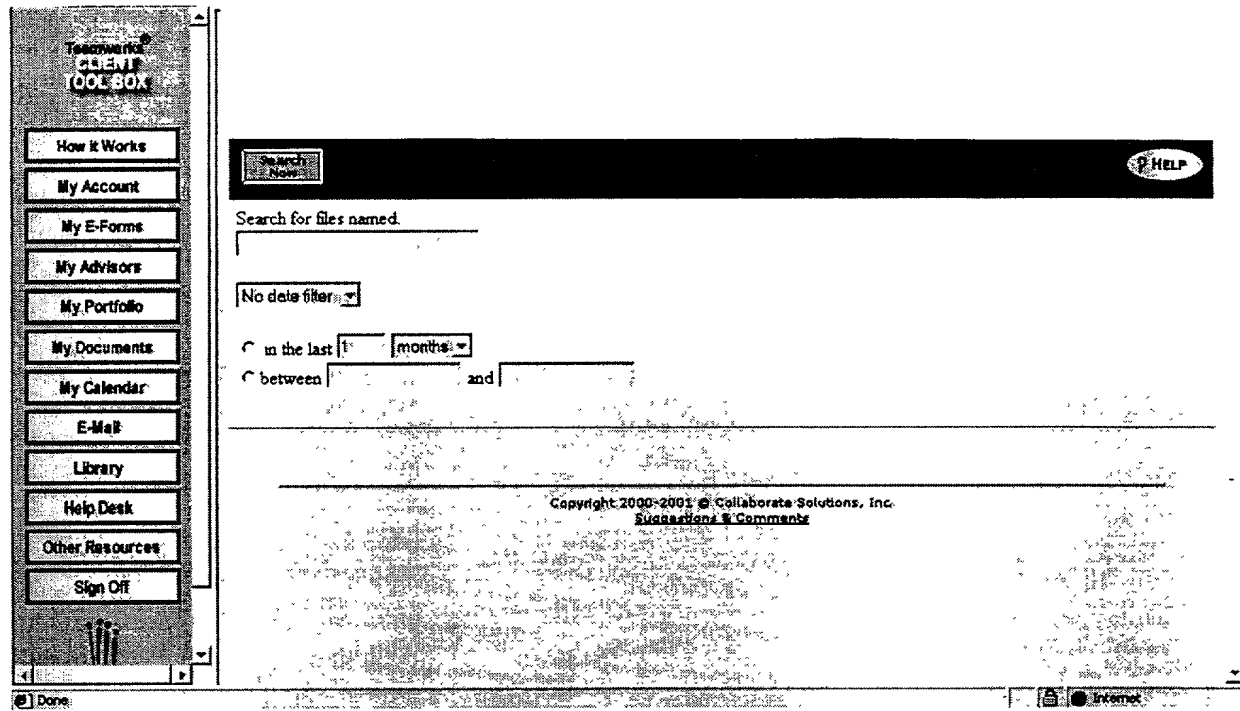


FIG. 43